

State of California

Admin/Users Guide For Enterprise Customer Satisfaction Survey

Revised 09/3/2004

TABLE OF CONTENTS

1	INTRODUCTION	1
2	ECSS ACCOUNT MANAGEMENT	1
3	B ECSS ITEMS HIERARCHY	1
4	ECSS QUESTION TYPES	1
5		
6		
U		
	6.1 Survey Admin	
	6.1.1 Applications	
	6.1.2 Surveys	
	6.1.4 Answers	
	6.2 REPORTS	
7	SURVEY PREVIEW	15
8	SURVEY INTEGRATION	19
9	ECSS AGENCY USERS	20
	9.1 Reports	20
10	0 ECSS ADMIN USERS	21
	10.1 Generic Questions	24
	10.2 DEPARTMENT SPECIFIC QUESTIONS	
	10.2.1 Departments	
	10.3 REPORTS	32
	10.4 EDD Load Interface	
	10.5 System Properties	32
11	1 ECSS REPORTS	34
	11.1 GENERIC QUESTIONS REPORTS	34
	11.1.1 Individual Questions Analysis	
	11.1.1.1 Parameter Form for ECSS Admin	
	11.1.1.2 Parameter Form for ECSS Department Admin	
	11.1.1.3 Parameter Form for ECSS Agency User	
	11.1.1.4 Output Layout	
	11.1.2 Two Way Cross Tab	

11.1.2.1	Parameter Form for ECSS Admin	38
11.1.2.2	Parameter Form for ECSS Department Admin	39
11.1.2.3	Parameter Form for ECSS Agency User	40
11.1.2.4	Output Layout	41
11.2 Specific	C QUESTIONS REPORTS	42
11.2.1 Inc	dividual Questions Analysis	42
11.2.1.1	Parameter Form for ECSS Admin	
11.2.1.2	Parameter Form for ECSS Department Admin	43
11.2.1.3	Parameter Form for ECSS Agency User	44
11.2.1.4	Output Layout	45
11.2.2 Tw	vo Way Cross Tab	
11.2.2.1	Parameter Form for ECSS Admin	46
11.2.2.2	Parameter Form for ECSS Department Admin	47
11.2.2.3	Parameter Form for ECSS Agency User	48
11.2.2.4	Output Layout	49
11.3 DATA E	EXPORT REPORT	50
11.3.1 Pa	rameter Form for ECSS Admin	50
11.3.2 Pa	rameter Form for ECSS Department Admin	51
11.3.3 Pa	rameter Form for ECSS Agency User	52
11.3.4 Ou	ıtput	53
12 EDD DAT	ΓA UPLOAD	55
12.1 Data F	ORMAT	55
12.2 PRE-RE	QUISITES	55
12.3 ECSS -	EDD DATA UPLOAD SCREEN	56

1 Introduction

The purpose of this document is to provide instructions to ECSS users on how to use the system.

The target users for this document are as follows:

- > ECSS Department Admin Users
- > ECSS Agency Users
- > ECSS Admin User(s)

2 ECSS Account Management

ECSS uses My California portal framework for user account management. All ECSS users will need to have an account with the My California portal to be able to use ECSS for managing surveys and performing analysis. You have an option of turning off the generic questions and using the ECSS as a more versatile data-gathering tool. To turn off the default questions call the ECSS Administrator at Teale Data Center (916) 464-4105 with your department code and the number of the survey.

Following are the steps to have your account created for ECSS:

1. Register at http://my.ca.gov/state/portal/myca_homepage.jsp to create an account that you would like to use for administering ECSS (Register link is on top-left in the page shown below). Note that username and password are case-sensitive and can be 4 to 11 characters long.



Complete all the steps of the registration process.

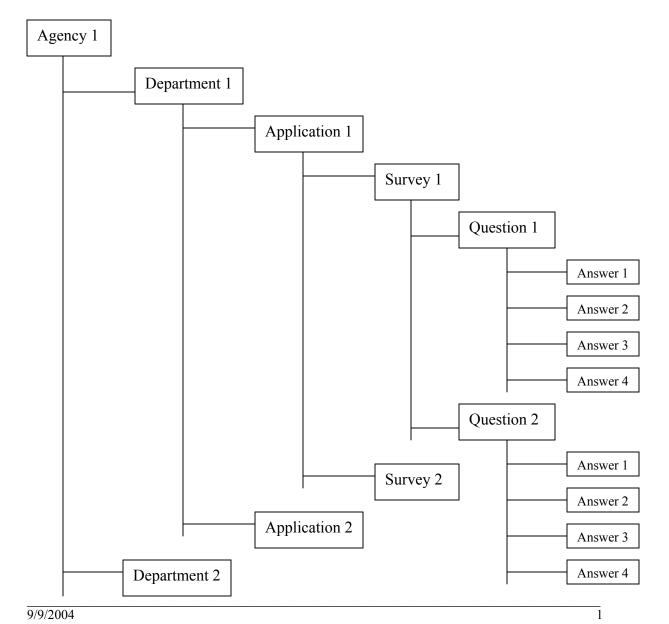
- 2. Send following information about yourself to ECSS administrator at Teale Data Center:
 - First Name
 - Last Name
 - Email Address
 - Phone Number
 - Department / Agency
 - ECSS Role (ECSS Dept Admin or ECSS Agency User)
 - Username (this is the username you just created in previous step)
 - Department Name
 - Department URL
 - Department 3-digit code
- 3. ECSS administrator will ensure that your department info has been added to ECSS.
- 4. ECSS administrator will also coordinate with portal M&O team to grant you appropriate ECSS role.
- 5. After your account is setup, you are ready to use ECSS.

3 ECSS Items Hierarchy

Following is the list of ECSS items:

- Agencies
- Departments
- Applications
- Surveys
- Questions
- Answers

Here is the hierarchy of above items:



4 ECSS Question Types

ECSS allows following 6 types of questions:

1. Multiple Choices – Select One

How would you rate the "ease of use" of (name of application)?

- o Very Easy to Use
- o Easy to Use
- o Neither Easy nor Difficult to Use
- o Difficult to Use
- o Very Difficult to Use

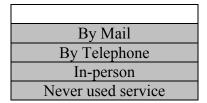
2. Multiple Choices – Select all that apply

Why did you conduct this transaction online? Select all that apply.

- □ Faster
- Easier
- □ No time to go to State Office
- Prefer online transactions
- □ Ability to pay by credit card

3. List of Values – Select one from drop down list

How did you previously conduct this transaction?



4. Free Text

Do you have any additional comments or questions? If you wish to receive a reply from us, please include your name and email address.

(Maximum 255 characters)

5. Multiple Choices – Select one with detail

How long did this transaction take to perform?

- o Under 5 minutes
- o 6-10 minutes
- o 11-15 minutes
- o Other/Please specify

6. Rank – Select rank in relation to other listed answers

How would you rank your abilities? (1=poor, 4=excellent)

	1	2	3	4
Swimming	0	O	O	O
Singing	O	O	O	0
Sancing	O	O	O	0
Team sports	0	O	0	O

7. Text box

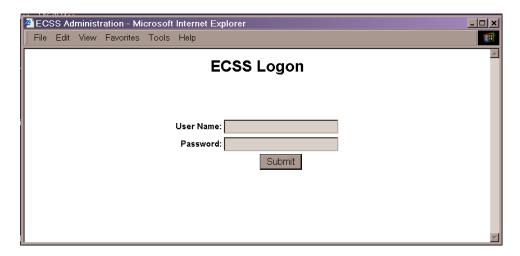
What aspect of the application would you like to improve?

(user define number of characters)

5 ECSS Logon

Go to URL http://www.ca.gov/state/ecss/admin/ecss_login.jsp for signing on to ECSS. You may wish to bookmark the link for later use.

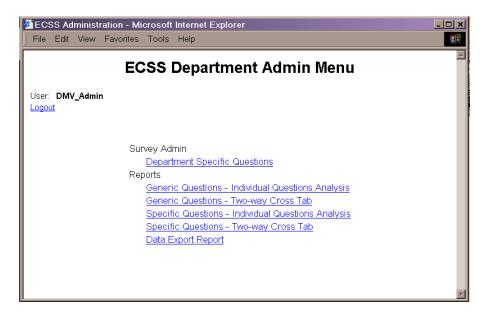
ECSS has a common logon screen for all users as shown below:



Depending upon user's ECSS role, the logon screen displays appropriate page for the user.

6 ECSS Department Admin Users

Department admin user will see following page after successful log on:



6.1 Survey Admin

Department admin user can add, modify or delete application, survey, questions and answers.

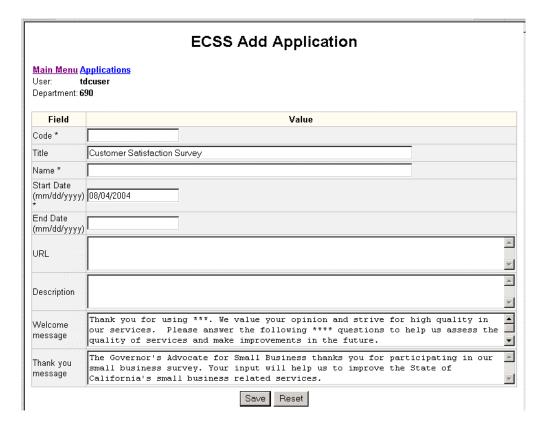
Note that Delete function is only to allow for correcting any erroneous entries. If an item has been created and has been used i.e. a survey response has been recorded, the system does not allow deleting that entry.

6.1.1 Applications

Clicking Department Specific Questions from above screen displays following page:



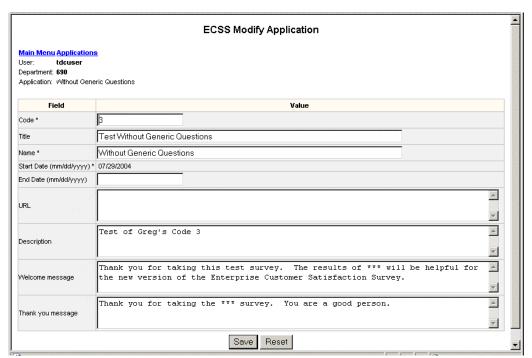
Clicking Add button in above screen shows following form for adding an application:



Following table describes each field in the form:

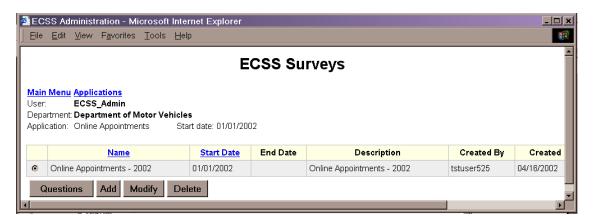
Field	Type	Length	Optional	Comments
Code	Numeric	3	No	You may use any number for application
				code. Note that it must be unique for your
				department.
Title	Text	80	Yes	You can keep the default or type what
				you want
Name	Text	80	No	
Start Date	Text	10	No	Start date can be any date later than or
				same as today's date
End Date	Text	10	Yes	End date can be open (blank). End date
				must be later than or same as start date.
URL	Text	1024	Yes	
Description	Text	80	Yes	Type a brief description.
Welcome	Text	500	Yes	You can keep the default or type your
message				own. *** = "Name" and **** = a count
				of the survey questions.
Thank you	Text	500	Yes	You can keep the default or type your
message				own. *** = "Name" and **** = count
Created By				Populated by the system
Created				Populated by the system
Modified By				Populated by the system
Modified				Populated by the system

Following screen shows Modify Application form:

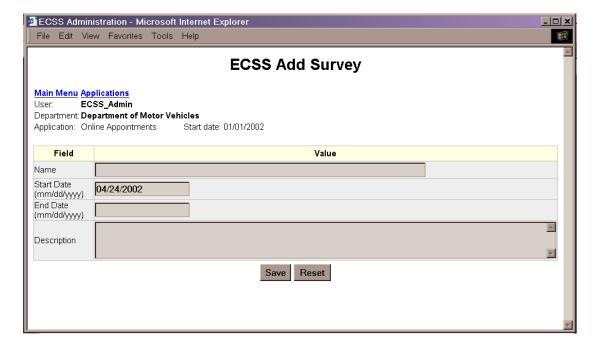


6.1.2 Surveys

Clicking surveys from Applications screen displays following page:



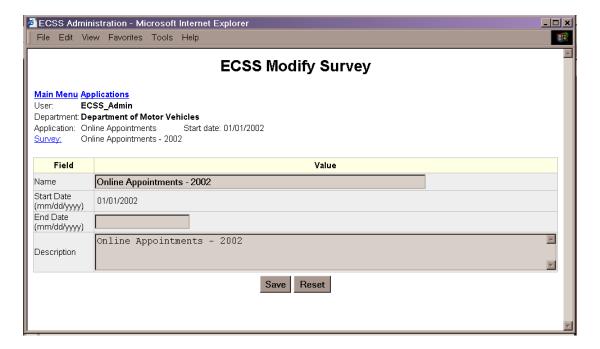
Clicking Add button in above screen shows following form for adding a survey:



Following table describes each field in the form:

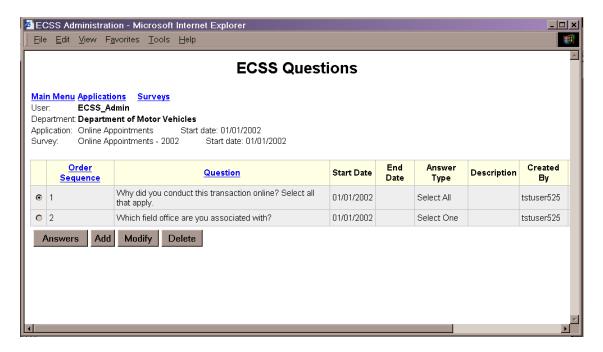
Field	Type	Length	Optional	Comments
Name	Text	80	No	
Start Date	Text	10	No	
End Date	Text	10	Yes	
Description	Text	80	Yes	
Created By				Populated by the system
Created				Populated by the system
Modified By				Populated by the system
Modified				Populated by the system

Following screen shows Modify Survey form:

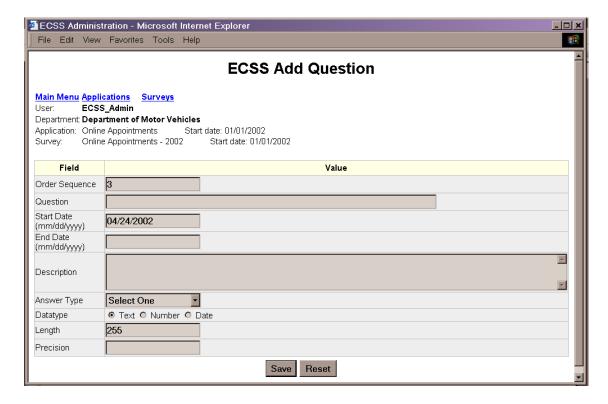


6.1.3 Questions

Clicking questions from surveys screen displays following page:



Clicking Add button in above screen shows following form for adding a question:



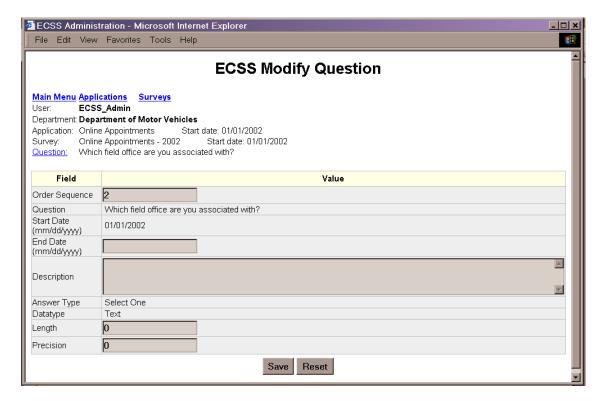
Following table describes each field in the form:

Field	Type	Length	Optional	Comments
Order Sequence	Numeric	2	No	The sequence in which questions would
				appear on the survey page
Question	Text	255	No	
Start Date	Text	10	No	
End Date	Text	10	Yes	
Description	Text	255	Yes	
Answer Type*	Select		No	
Datatype	Select		No	Defaults to text. Choose only when you want to define a question of type 5 i.e. Multiple choice – select one with detail with text box and want to control what type of input should be accepted by the system in the text box.
Length	Numeric	3	Yes	Required when answer type is one of the following: 'select one + detail', 'rank'
Precision	Numeric	2	Yes	
Created By				Populated by the system
Created				Populated by the system
Modified By				Populated by the system
Modified				Populated by the system

* - Following are the values and description of 'answer types':

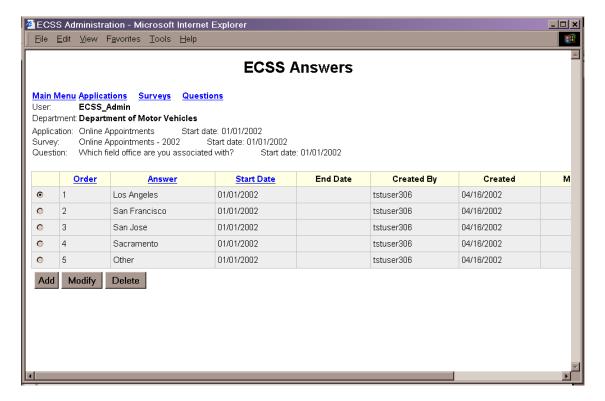
Value	Description
Select One	Multiple choice - Select one
Select All	Multiple choice - Select all (one or
	more) that apply
List of Values	List of Values
Free Text	Free Text
Select One + Detail	Multiple choice - Select one with
	text box for 'Other'

Following screen shows Modify Question form:



6.1.4 Answers

Clicking answers from questions screen displays following page:



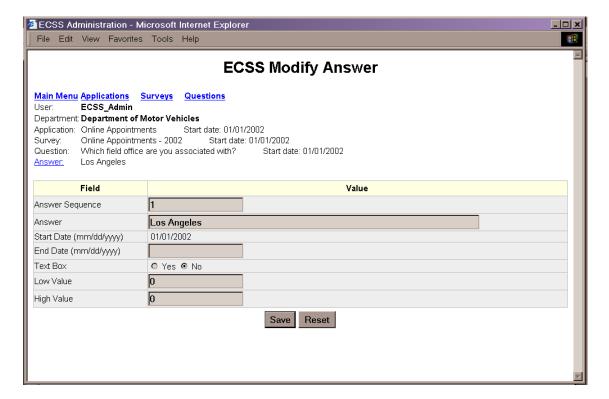
Clicking Add button in above screen shows following form for adding an answer:

_ | _ | × ECSS Administration - Microsoft Internet Explorer <u>File Edit View Favorites Tools Help</u> **ECSS Add Answer** Main Menu Applications Surveys Questions ECSS_Admin Department: Department of Motor Vehicles Application: Online Appointments Start date: 01/01/2002
Survey: Online Appointments - 2002 Start date: 01/01/2002
Question: Which field office are you associated with? Start da Start date: 01/01/2002 Field Value Answer Sequence Answer 04/24/2002 Start Date (mm/dd/yyyy) End Date (mm/dd/yyyy) Text Box O Yes 💿 No Low Value High Value Save Reset

Following table describes each field in the form:

Field	Type	Length	Optional	Comments
Answer Sequence	Numeric	2	No	The sequence in which answers
				would appear on the survey page
Answer	Text	80	No	
Start Date	Text	10	No	
End Date	Text	10	Yes	
Text Box	Select		No	Default value is No. Choose Yes
				only when you are defining an
				answer like 'Other/Please Specify'
				and want a text box to appear next
				to that answer.
Low Value	Numeric	12	Yes	Not used
High Value	Numeric	12	Yes	Not used
Created By				Populated by the system
Created				Populated by the system
Modified By				Populated by the system
Modified				Populated by the system

Following screen shows Modify Answer form:



6.2 Reports

Department admin users can run reports for applications belonging to their department. See reports section later in this document for information on how to use reports pages.

7 Survey Preview

You will need to define all components with start date as today's date to be able to preview the survey page. Also, you will need following information to preview the survey:

- Department code (3-digit department code for your department)
- Application code (this is the code you chose while defining your application in ECSS)

Enter URL like following in your browser to preview the survey page:

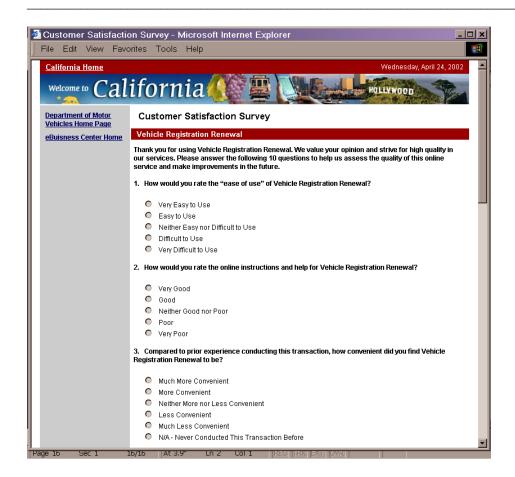
http://www.ca.gov/state/ecss/first.jsp?DEPT=dcode&APP=acode where dcode is the department code and acode is the application code.

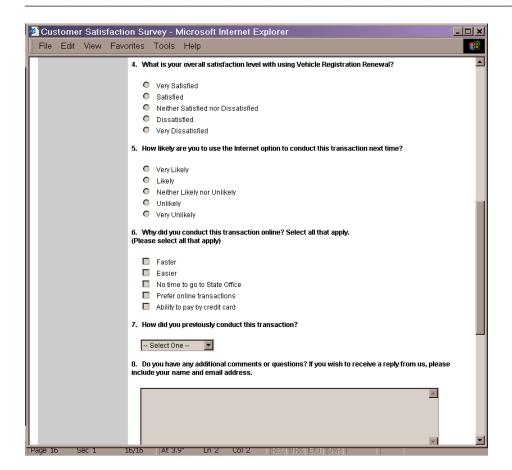
After reviewing the survey page for the content, place the survey link at your website from where it should be invoked by customers.

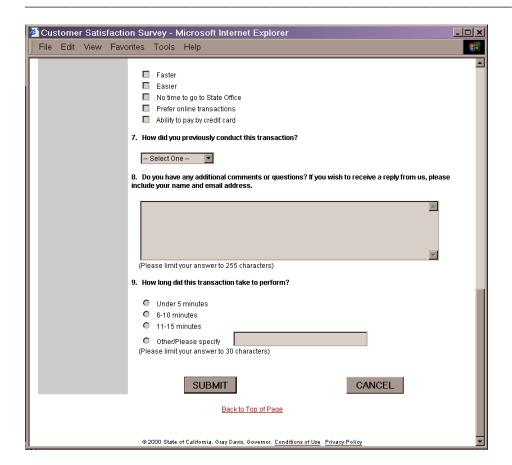
For example, a survey page for Vehicle Registration System application for DMV will be at URL like the following:

http://www.ca.gov/state/ecss/first.jsp?DEPT=525&APP=2

Sample survey page is shown below:







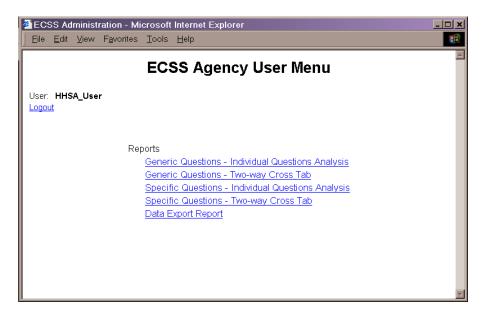
8 Survey Integration

Once you have defined a survey for an application and have previewed it, you will need to contact your web/application development team to create a link on the department / application's web page/site. The department admin user along with the web development team will need to decide where would they want to create the link to ECSS on their web page/site.

The department's web page/site should invoke the ECSS survey application by redirecting to the URL similar to http://www.ca.gov/state/ecss/first.jsp?dept=123&app=456 where 123 is 3-digit department code and 456 is application code. These two parameters tell ECSS which survey needs to be presented.

9 ECSS Agency Users

Agency user will see following page after successful log on:



9.1 Reports

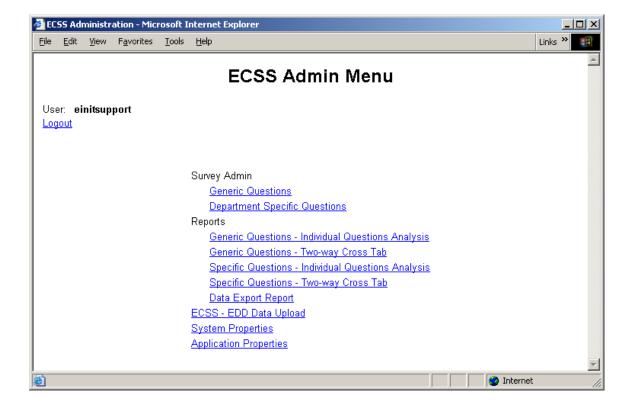
Agency users can run reports for applications belonging to the departments managed by their agency. See reports section later in this document for information on how to use reports pages.

10 ECSS Admin Users

The Statewide eGovernment Initiatives Office will administer the ECSS for various departments and agencies. Specifically, ECSS admin user will be able to perform following functions:

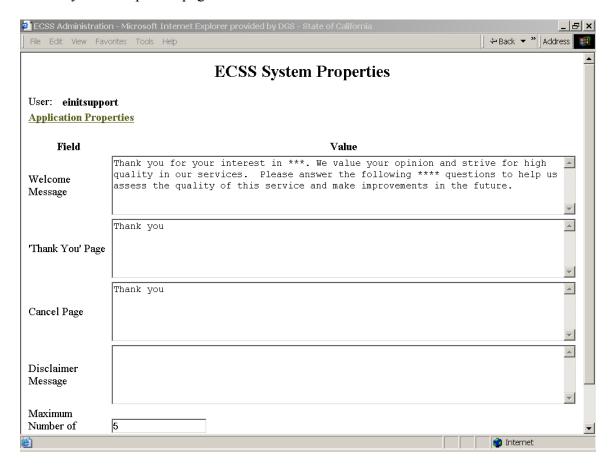
- ➤ Define / Modify / Delete generic questions and their answers for ECSS
- > Setup ECSS system properties like turn off the generic questions and/or questions limit for a specific survey, welcome message and text message at the bottom of survey page and maximum number of department specific questions per survey
- Define / Modify / Delete departments, applications, surveys, questions and answers
- > Run all reports

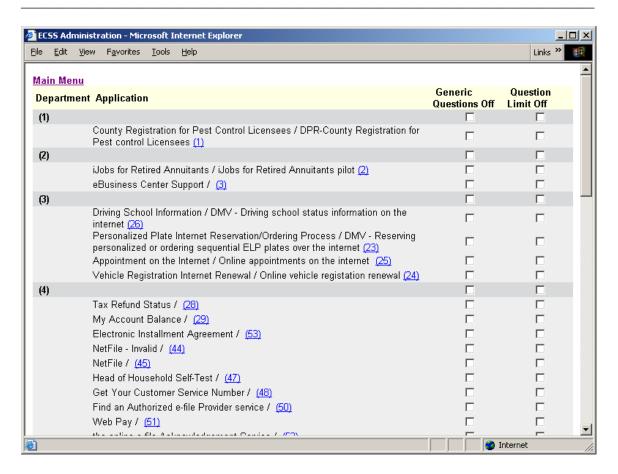
Following page appears after ECSS admin user logs on:



10.1a System Properties

ECSS Admin user will be able to turn off the generic questions and/or the survey question limit by selecting the System Property option listed under the user name on the ECSS System Properties page:



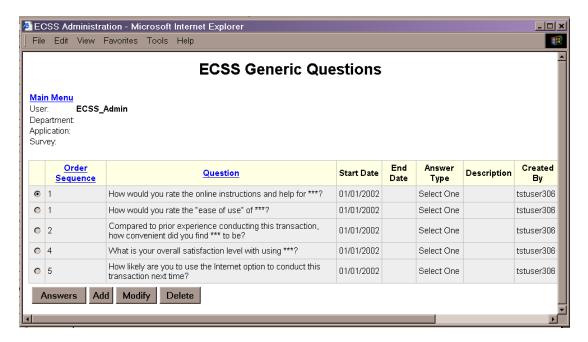


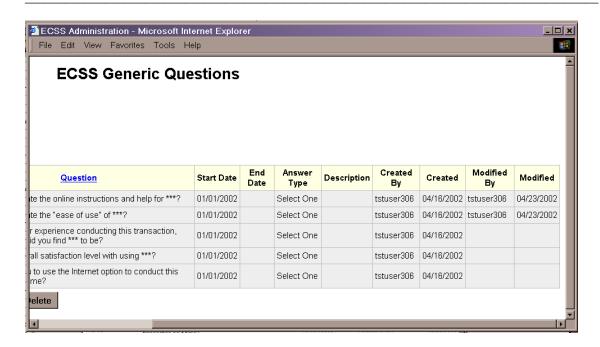
Turn off the generic questions and/or the question limit by checking the appropriate box for the application. Save the setting and return to the Main Menu.

10.1 Generic Questions

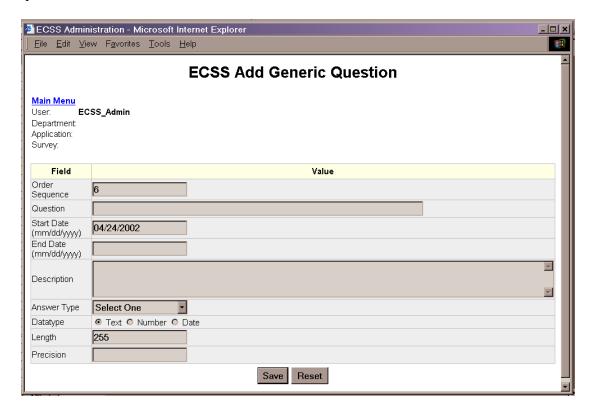
ECSS admin user will be able to add, modify or delete generic questions and their answers in ECSS. Only ECSS admin user has this role. Generic questions will be used by all applications that use ECSS and will be displayed first on the survey page. Note that user may place *** (3 asterisks) in the question text where s/he wants ECSS to insert the application name for which the generic question is being presented.

Clicking generic questions from ECSS admin menu displays following page:





Clicking Add button in above screen shows following form for adding an a generic question:



Following table describes each field in the form:

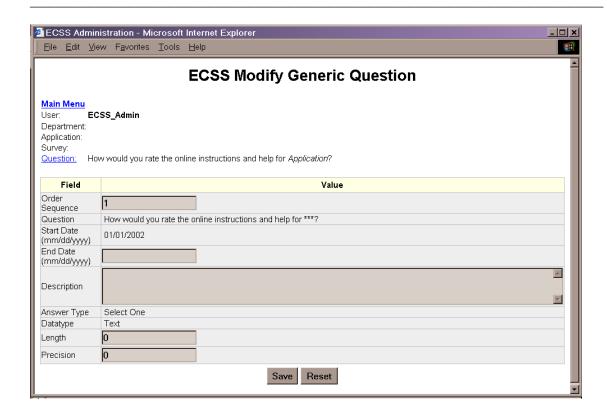
Field Type Length Optional Comments	Field	Type	Lengin		Comments
---	-------	------	--------	--	----------

Order Sequence	Numeric	2	No	The sequence in which questions would appear on the survey page
Question	Text	255	No	appear on the survey page
Start Date	Text	10	No	
End Date	Text	10	Yes	
Description	Text	255	Yes	
Answer Type*	Select		No	
Datatype	Select		No	Defaults to text. Choose only when you want to define a question of type 5 i.e. Multiple choice – select one with detail with text box and want to control what type of input should be accepted by the system in the text box.
Length	Numeric	3	Yes	Required when answer type is one of the following: 'select one + detail', 'rank'
Precision	Numeric	2	Yes	
Created By				Populated by the system
Created				Populated by the system
Modified By				Populated by the system
Modified				Populated by the system

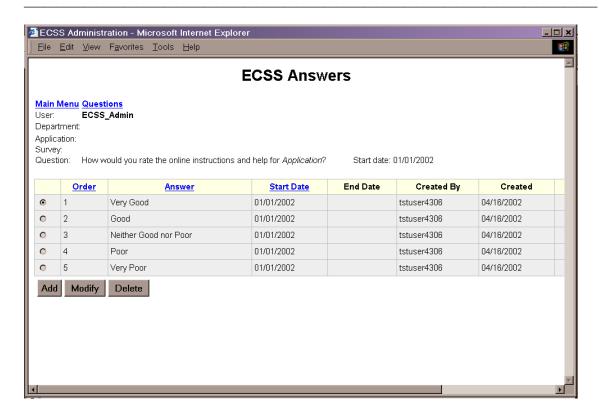
^{* -} Following are the values and description of 'answer types':

Value	Description
Select One	Multiple choice - Select one
Select All	Multiple choice - Select all (one or
	more) that apply
List of Values	List of Values
Free Text	Free Text
Select One + Detail	Multiple choice - Select one with
	text box for 'Other'

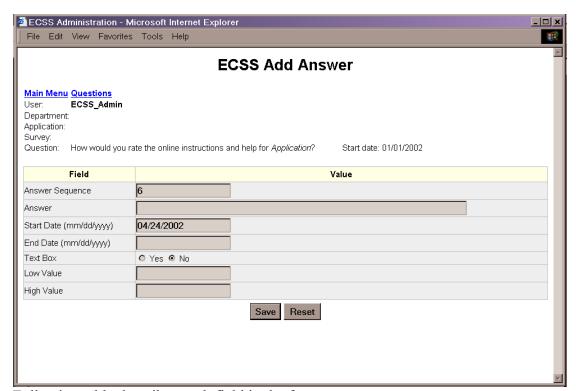
Following screen shows Modify Generic Question form:



Clicking Answers in Generic Questions screen displays following page:



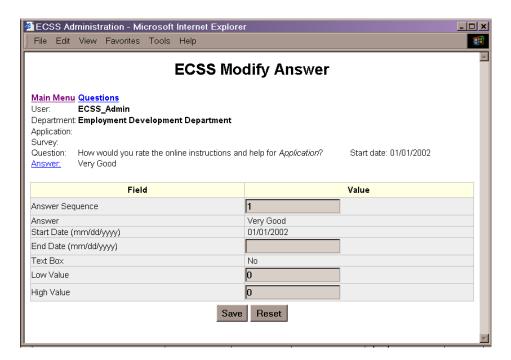
Clicking Add button in above screen shows following form for adding an answer:



Following table describes each field in the form:

Field	Type	Length	Optional	Comments
Answer Sequence	Numeric	2	No	The sequence in which answers
				would appear on the survey page
Answer	Text	80	No	
Start Date	Text	10	No	
End Date	Text	10	Yes	
Text Box	Select		No	Default value is No. Choose Yes
				only when you are defining an
				answer like 'Other/Please Specify'
				and want a text box to appear next
				to that answer.
Low Value	Numeric	12	Yes	Not used
High Value	Numeric	12	Yes	Not used
Created By				Populated by the system
Created				Populated by the system
Modified By				Populated by the system
Modified				Populated by the system

Following screen shows Modify Answer form:



10.2 Department Specific Questions

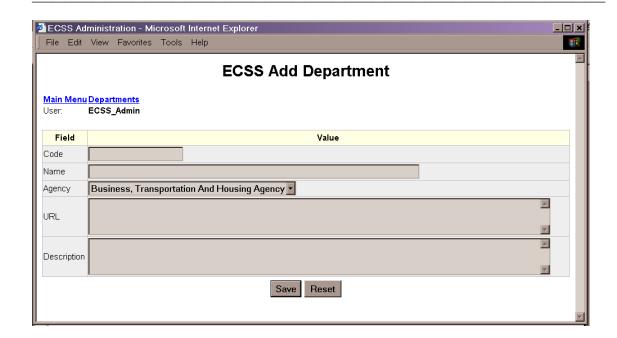
ECSS admin user can also add, modify or delete department specific questions. In addition, he/she can manage departments in ECSS as shown below:

10.2.1 Departments

Clicking Department Specific Questions from the ECSS admin menu displays following page:



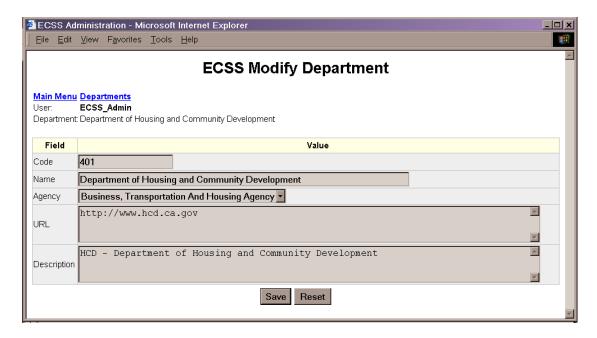
Clicking Add button in above screen shows following form for adding a department:



Following table describes each field in the form:

Field	Type	Length	Optional	Comments	
Code	Numeric	3	No	This is a 3-digit code for the	
				department.	
Name	Text	80	No		
Agency	Select		No		
URL	Text	1024	No	Must specify URL for department	
				web site.	
Description	Text	80	Yes		
Created By				Populated by the system	
Created				Populated by the system	
Modified By				Populated by the system	
Modified				Populated by the system	

Following screen shows Modify Department form:



Please see previous section for information on how to manage applications, surveys, questions and answers.

10.3 Reports

ECSS admin user can also run reports for all applications across all departments and agencies. See reports section later in this document for information on how to use reports pages.

10.4 EDD Load Interface

ECSS admin user can upload EDD customer surveys' data using the *ECSS - EDD Data Upload* screen. Please see *ECSS - EDD Data Upload* section later in this document for information on how to upload the data.

10.5 System Properties

ECSS admin user will be able to set following 5 system properties:

- Welcome message at the top of survey page
- Thank-you message at Thank You page

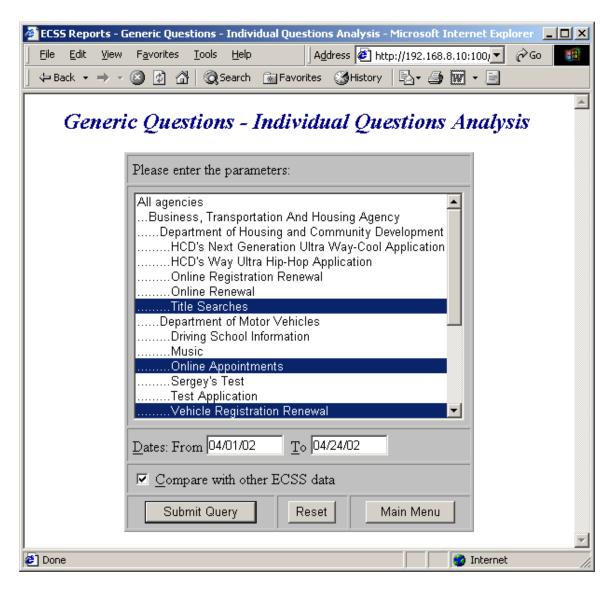
- Survey cancel message
- Survey page disclaimer text at the bottom of the page
- Maximum number of department specific questions per survey

11 ECSS Reports

11.1 Generic Questions Reports

11.1.1 Individual Questions Analysis

11.1.1.1 Parameter Form for ECSS Admin



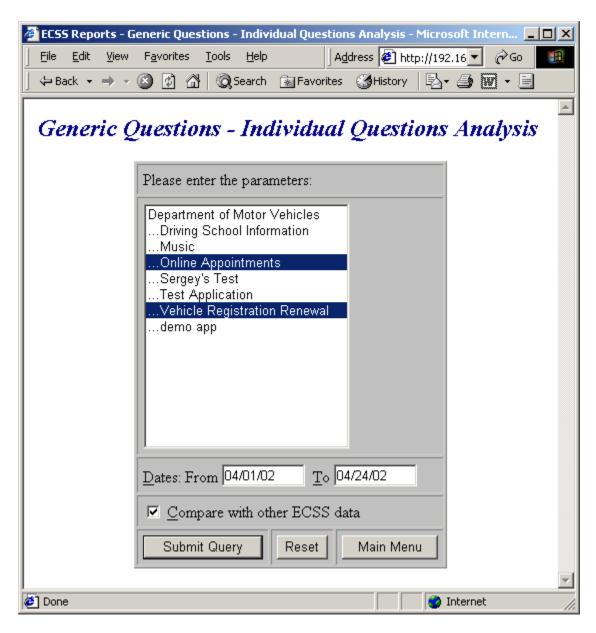
ECSS Admin will be able to choose any combination of the agencies, departments, and/or applications using the following standard technique:

- Mouse-click for selection of one agency, department or application
- Mouse-click holding the Ctrl key for addition of one agency, department or application to the selection.

 Mouse-click holding the Shift key for addition of agencies, departments or applications up to the current into the selection.

Note: Checking "Compare with other ECSS data" will also show survey results for ALL other ECSS (other than selected applications) data for same time period.

11.1.1.2 Parameter Form for ECSS Department Admin

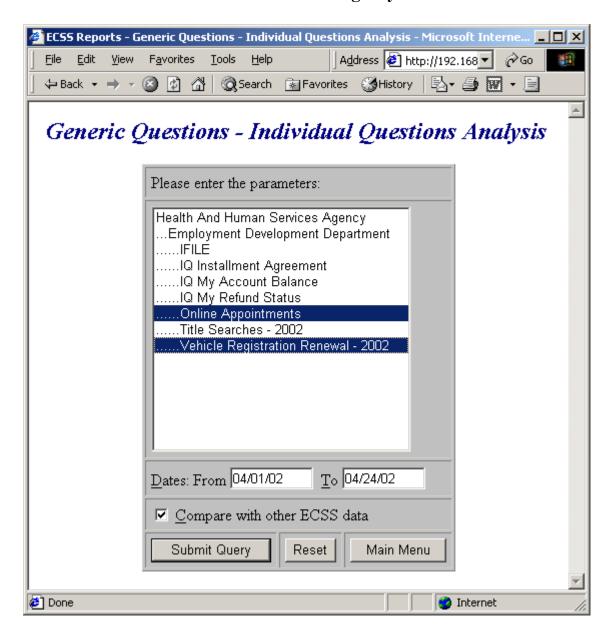


ECSS Department Admin will be able to choose any combination of the applications using the following standard technique:

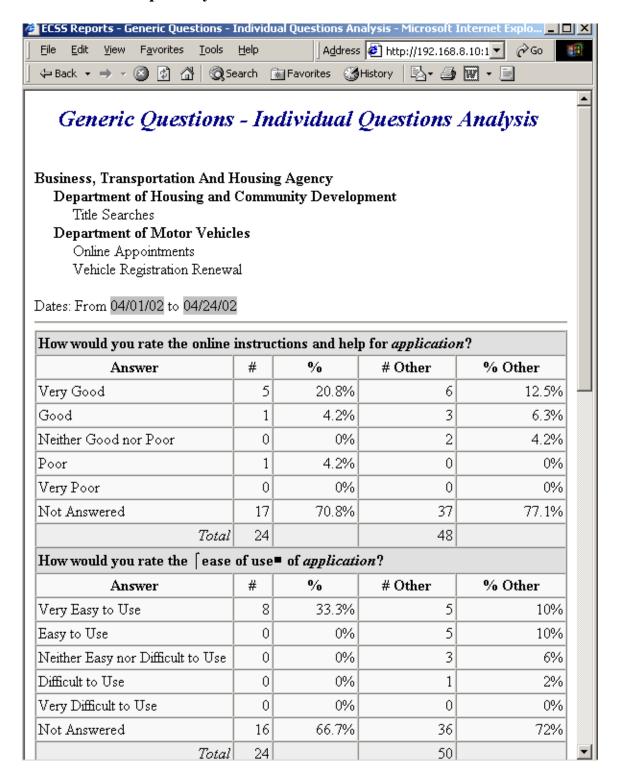
- Mouse-click for selection of one application or the department
- Mouse-click holding the Ctrl key for addition of one application to the selection.

• Mouse-click holding the Shift key for addition of applications up to the current into the selection.

11.1.1.3 Parameter Form for ECSS Agency User

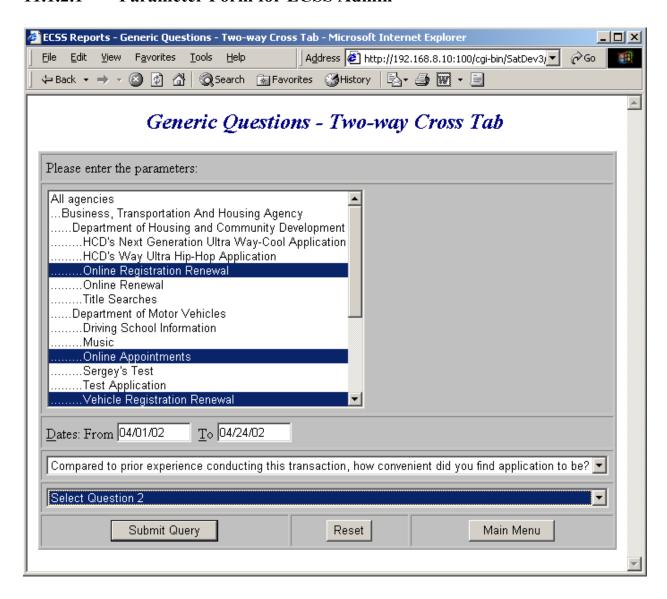


11.1.1.4 Output Layout

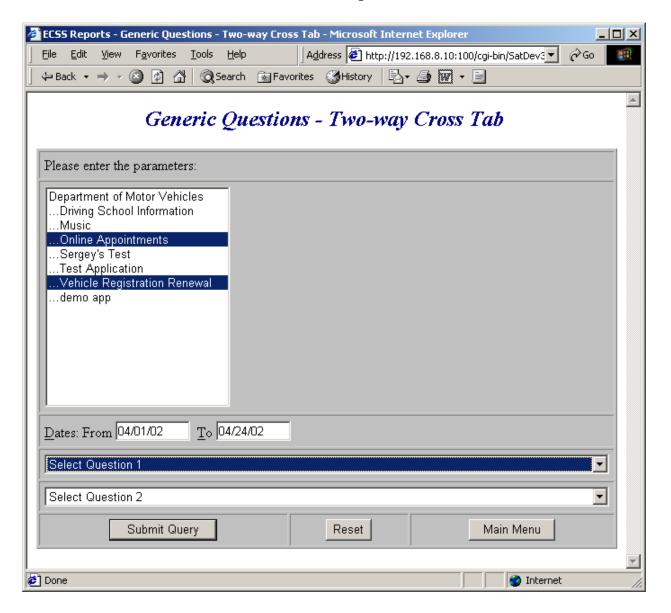


11.1.2 Two Way Cross Tab

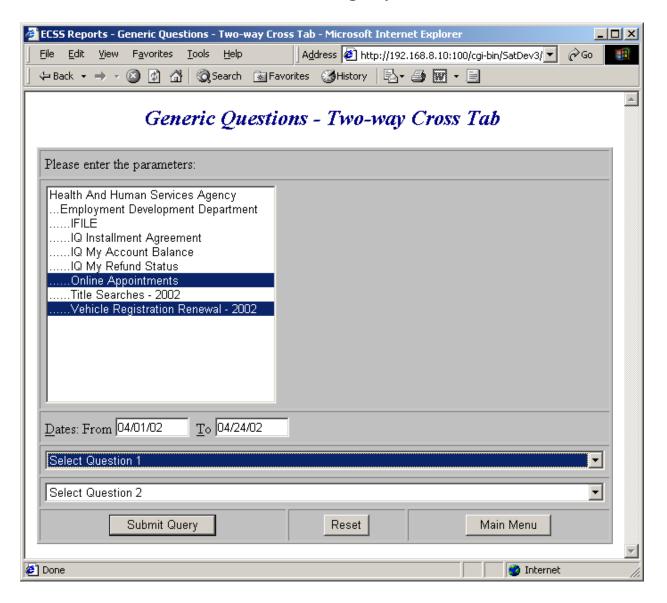
11.1.2.1 Parameter Form for ECSS Admin



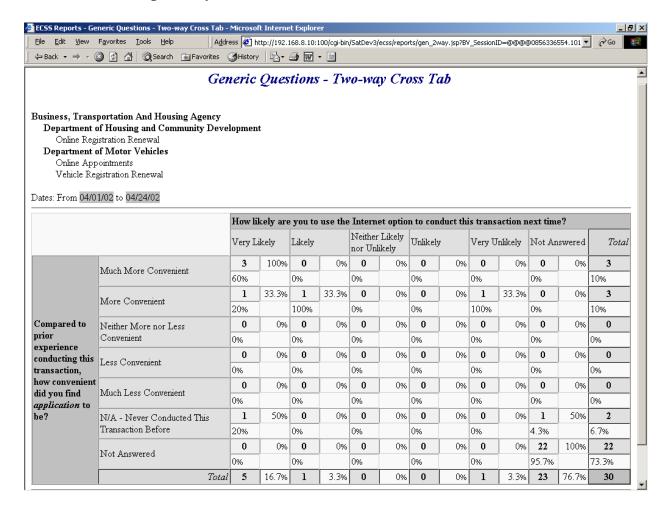
11.1.2.2 Parameter Form for ECSS Department Admin



11.1.2.3 Parameter Form for ECSS Agency User



11.1.2.4 Output Layout

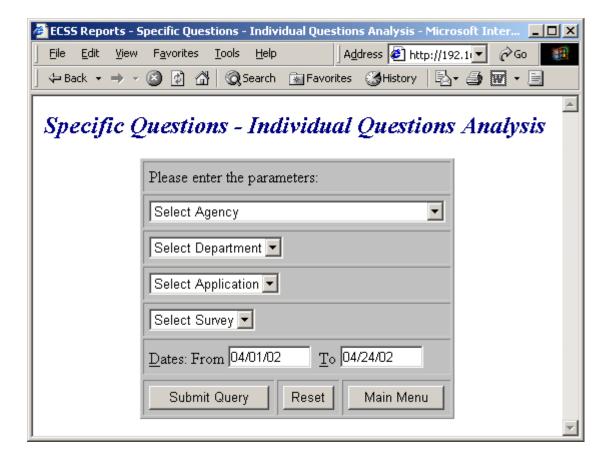


11.2 Specific Questions Reports

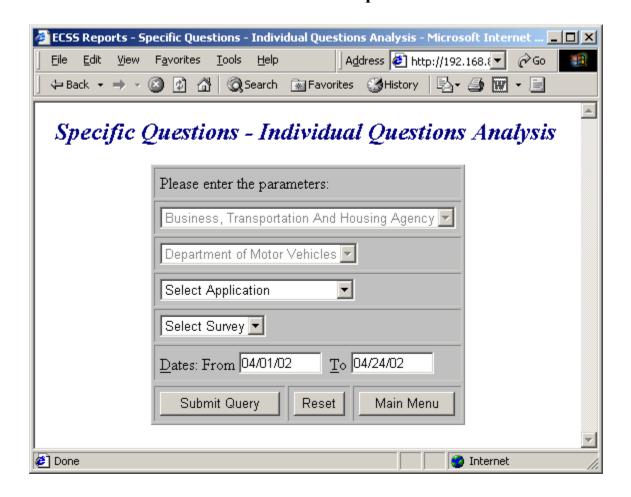
11.2.1 Individual Questions Analysis

Note: This report will show generic questions as well as specific questions for given survey.

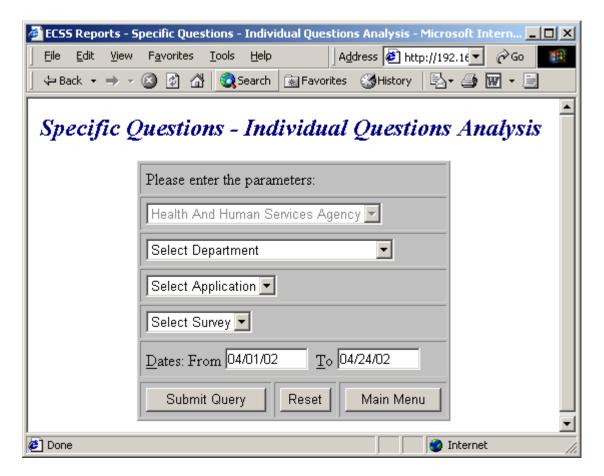
11.2.1.1 Parameter Form for ECSS Admin



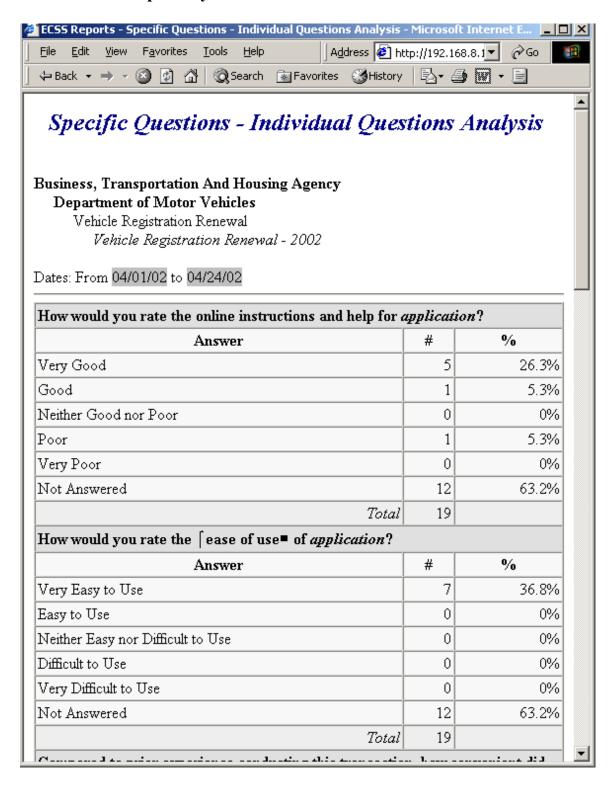
11.2.1.2 Parameter Form for ECSS Department Admin



11.2.1.3 Parameter Form for ECSS Agency User

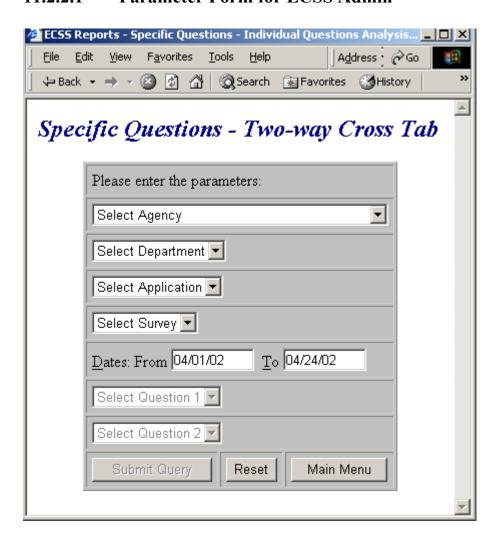


11.2.1.4 Output Layout

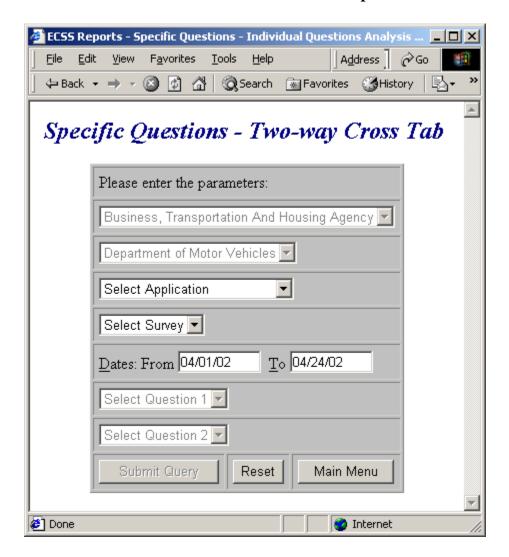


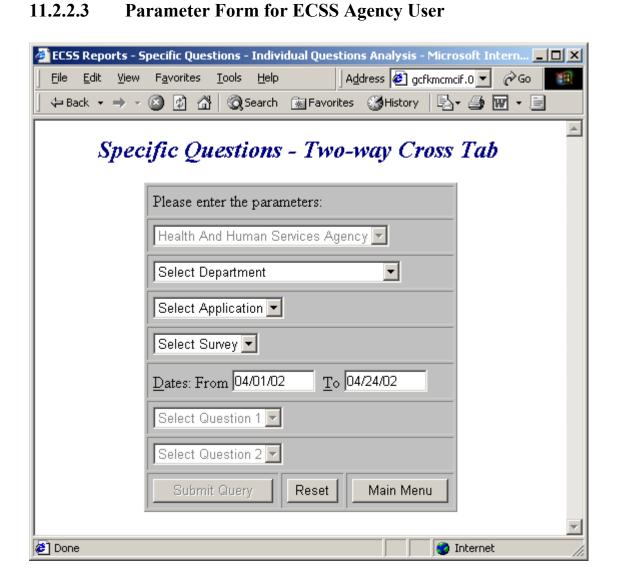
11.2.2 Two Way Cross Tab

11.2.2.1 Parameter Form for ECSS Admin

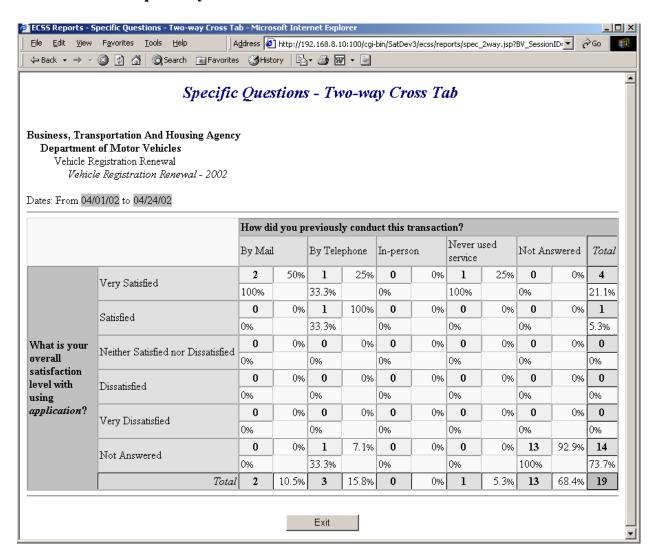


11.2.2.2 Parameter Form for ECSS Department Admin



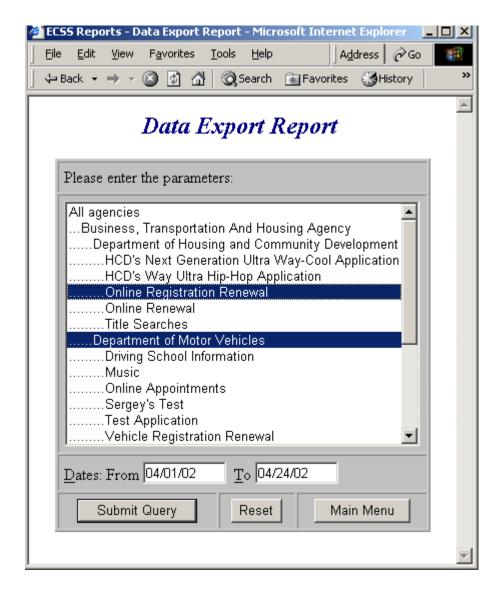


11.2.2.4 Output Layout



11.3 Data Export Report

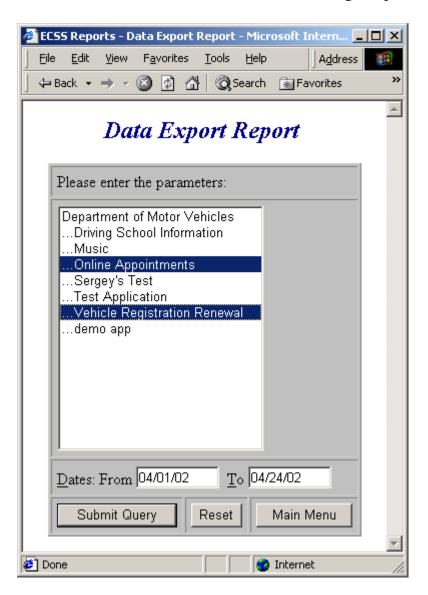
11.3.1 Parameter Form for ECSS Admin



11.3.2 Parameter Form for ECSS Department Admin

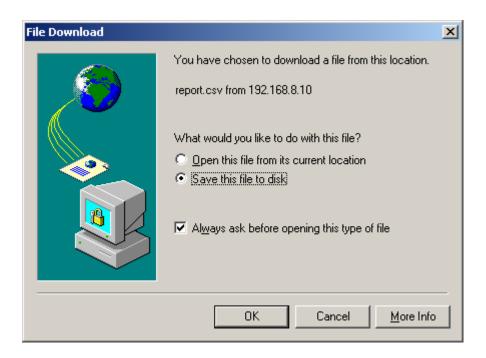


11.3.3 Parameter Form for ECSS Agency User



Note: Above form will allow you to select from multiple departments under your agency.

11.3.4 Output



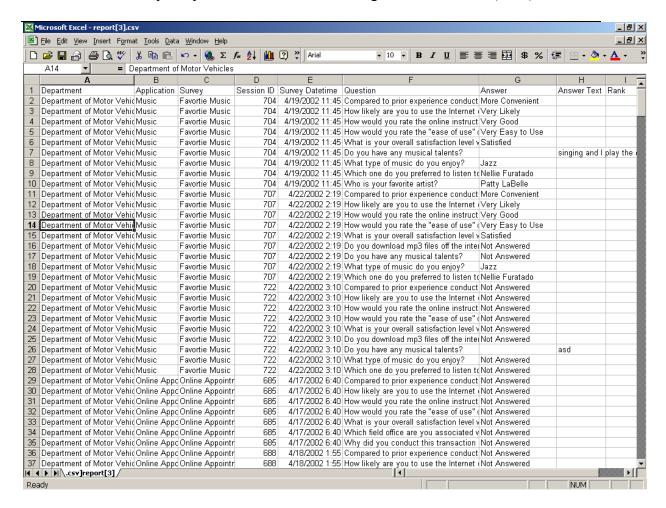
The output data file will contain the following fields separated by comma and optionally enclosed by double quotes:

Department	Application	Survey	Customer	Survey	Question	Answer	Answer	Rank
Name	Name	Name	Session	Date			Text	
			ID	time				

The Survey Date time will have the 'MM/DD/YYYY HH:MI:SS' format where HH = 0...23

In the Answer Text field, the line feed characters will be substituted by the spaces.

This file will be ready to open in Microsoft Excel using the standard text (CSV) mode.



12 EDD Data Upload

12.1 Data Format

Each data row must have the following fields separated by comma and optionally enclosed by double quotes:

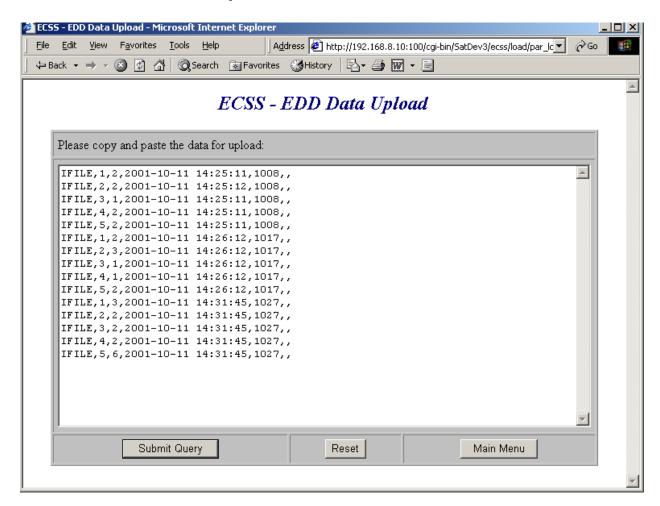
- Application Name (e.g. IFILE)
- Question Sequence (1,2,3,...)
- Answer Sequence (1,2,3,...)
- Survey Datetime (2001-10-11 14:31:45)
- Survey Id (ECSS determines ECSS customer session id by adding 1000,000,000 as offset to EDD survey id. Note that EDD survey id must be unique across all of their data for IFILE application)
- Answer Text (blank for now) in use for the Free Text questions and answers having the text box. Currently, no generic questions are defined this way, but it may be changed in the future the system provides such ability.
- Rank (blank for now) in use for the Rank question type only. Currently, no generic questions are defined this way, but it may be changed in the future the system provides such extension ability.

12.2 Pre-Requisites

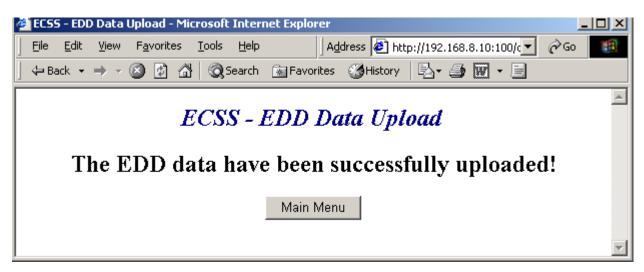
ECSS Administrator should define the following information using the *ECSS Admin - Department Specific Questions* mode:

- Employment Development *Department*. It must have 279 as the *Code*.
- Application(s) having the same Name as it appears in the first field of each data row (see above). Define just one application with name 'IFILE', start date equal to the system implementation date or earlier than the EDD data start date and open end-date.
- *Survey*(s) for that *application*(s), being active on the given dates (field 4 of the data rows). As of now, you define just one *survey* for the IFILE *application* and *start date* equal to the system implementation date or earlier than the EDD data start date and open end-date.

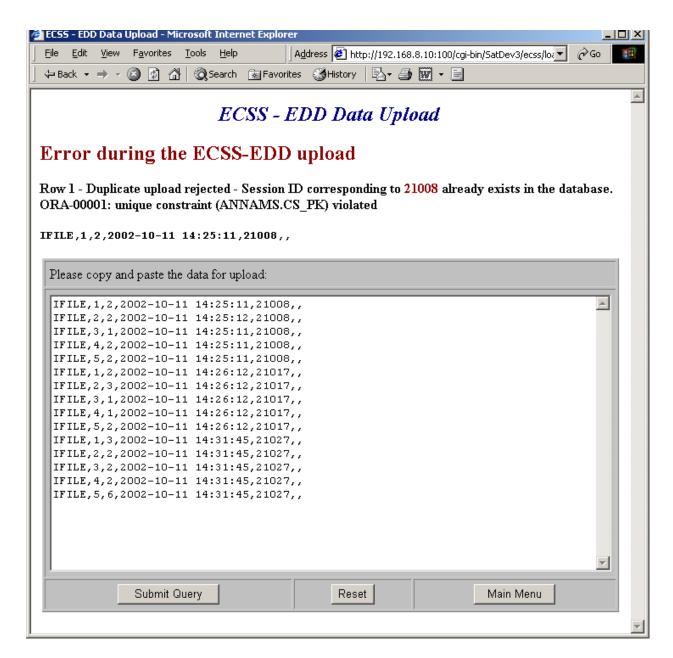
12.3 ECSS - EDD Data Upload screen



Copy and paste the data into the text area and push the Submit button. After all the data are processed, you will see the following message:



If any error arises, a message appears describing the reason and the row number, e.g.:



The data are populated into the database only after the successful completion. If any error rises, no data are recorded into the database. That allows you safely fix the erroneous data and repeat the upload.